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WORLD WOOL PRODUCTION

AND TRADE

World wool production in 1966 (including the 1966-67 season in the Southern Hemisphere) was estimated at 5,856.6 million pounds, greasy basis. This is approximately 1 percent above the 1965 clip.

In the 5 major Southern Hemisphere producing countries--where about 57 percent of the world's wool is produced--wool output is estimated to exceed last year's output by about 20 million pounds. Higher production in Argentina, New Zealand, and Uruguay is expected to more than offset the declines in Australia and South Africa.

In other parts of the world, production was reported to be up in the U.S.S.R. and small increases were reported in Eastern and Western Europe. The United States continued its downward trend as sheep numbers continued to drop.

Australia. The preliminary wool production forecast for 1966-67 was 1,630.5 million pounds. However, based on improved conditions in most parts of Australia which resulted in a substantially greater wool clip per head, a revised estimate of 1,712.2 million pounds, greasy basis, was made in late December. The revised estimate represents a 5 percent increase over the previous forecast made in July and 4.4 percent increase over the 1965-66 production of 1,640 million pounds.

Wool: Production in specified countries, average 1956-60, annual 1964-66 1/

Continent and country	Average 1956-60	1964	1965	2/ 1966	Percent change 1966 / 1956-60	Percent change 1965 / 1966
	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent
North America:						
Canada	7.7	6.3	5.8	5.3	- 31	- 9
United States 3/	308.8	264.6	253.2	250.0	- 19	- 1
Mexico	9.6	13.7	12.9	13.4	+ 40	+ 4
Others	1.0	1.0	1.0	1.0	0	0
Total North America	327.1	285.6	272.9	269.7	- 18	- 1
South America:						
Argentina	448.1	443.1	429.9	440.0	- 2	+ 2
Brazil	60.4	70.2	81.1	79.4	+ 31	- 2
Chile	48.7	55.6	56.2	56.9	+ 17	+ 1
Falkland Islands	4.5	4.5	4.5	4.5	0	0
Peru	20.9	24.3	22.0	22.0	+ 5	0
Uruguay	180.2	189.6	185.2	189.6	+ 5	+ 2
Others	15.4	16.5	16.7	16.7	+ 8	0
Total South America	778.2	803.8	795.6	809.1	+ 4	+ 2
Europe:						
France	62.9	53.0	56.0	60.0	- 5	+ 7
Italy	30.4	29.3	29.1	29.2	- 4	4/
Germany, West	11.5	7.5	6.8	6.0	- 48	- 12
Others (EEC)	3.6	2.8	2.9	2.9	- 19	0
Total EEC	108.4	92.6	94.8	98.1	- 10	+ 3
Greece	25.1	26.7	26.0	26.5	+ 6	+ 2
Ireland	21.2	26.3	26.2	25.7	+ 21	- 2
Norway	8.0	8.0	8.0	8.0	0	0
Portugal	23.8	25.9	26.0	26.0	+ 9	0
Spain	72.6	80.7	79.8	84.4	+ 16	+ 5
United Kingdom	116.3	126.7	127.3	128.0	+ 10	+ 1
Others	9.4	10.2	10.5	10.5	+ 12	0
Total Western Europe	384.8	397.1	398.6	407.2	+ 6	+ 2
Bulgaria	38.6	56.0	55.2	56.0	+ 45	+ 1
Hungary	15.7	23.2	22.5	22.3	+ 42	- 1
Poland	20.5	16.3	15.9	16.3	- 20	+ 3
Romania	44.5	54.7	55.6	58.2	+ 31	+ 5
Yugoslavia	31.3	26.9	27.8	28.7	- 8	+ 3
Others	25.0	26.4	27.0	27.0	+ 8	0
Total Eastern Europe	175.6	203.5	204.0	208.5	+ 19	+ 2
Total Europe	560.4	600.6	602.6	615.7	+ 10	+ 2
U.S.S.R. (Europe and Asia)	698.8	751.8	800.3	826.7	+ 18	+ 10

(Continued)

Wool: Production in specified countries, average 1956-60, annual 1964-66 1/

(Continued)

Continent and country	Average 1956-60	1964	1965	1966 2/	Percent change	
					1966 : 1956-60	1965 : 1966
	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent
Africa:						
Algeria	19.0	19.0	19.0	19.0	0	0
Morocco	34.9	34.0	30.9	35.0	4/	+13
Tunisia	7.8	9.0	9.0	9.0	+15	0
United Arab Republic	5.2	5.5	5.5	5.5	+ 6	0
South Africa, Rep. of 5/	313.9	315.0	362.5	342.0	+ 9	- 6
Others	14.2	15.1	15.1	15.1	+ 6	0
Total Africa	395.0	397.6	442.0	425.6	+ 8	- 4
Asia:						
Iran	41.9	39.7	40.8	41.9	0	+ 3
Iraq	24.7	28.0	28.0	28.0	+13	0
Turkey (Europe and Asia)	91.2	94.8	94.8	99.2	+ 9	+ 5
Syria	18.2	26.5	29.1	33.1	+82	+14
India	73.8	78.0	77.2	80.0	+ 8	+ 4
Japan	7.5	2.2	1.7	1.6	-79	- 6
Pakistan	32.5	32.5	30.0	30.0	- 8	0
Others	218.6	228.5	234.8	235.5	+ 8	4/
Total Asia	508.4	530.2	536.4	549.3	+ 8	+ 2
Oceania:						
Australia	1,578.8	1,783.7	1,660.0	1,712.2	+ 8	+ 3
New Zealand	538.3	623.3	694.8	730.0	+36	+ 5
Total Oceania	2,117.1	2,407.0	2,354.8	2,442.2	+15	+ 4
Total World	5,385.0	5,776.6	5,804.6	5,938.3	+10	+ 1

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Converted "pulled wool" to greasy basis at 1.7. 4/ Less than 0.5 percent change. 5/ Includes Botswana and South West Africa.

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Although the number of sheep available for shearing is believed to be about 5 percent smaller than last year, the individual clip per head is expected to be between 0.5 and 1 pound heavier than last year. In the Riverina area of New South Wales--an area not seriously affected by the drought of last year--the number of sheep shorn was up nearly 5.5 percent over 1965, but wool production showed an increase of more than 23 percent.

New Zealand. The estimate for 1966-67 production is 730 million pounds, approximately a 5 percent increase over last year. Farmers in nearly all parts of New Zealand reported the best winter they had experienced in several years with generally satisfactory weather and adequate feed supplies. Sheep numbers are now estimated at 59 million head, an all time high representing a 10 percent increase over sheep numbers in 1965. A 10 percent increase in lamb production is expected for the coming marketing season.

Argentina. Prospects of wool production are estimated at 440 million pounds, somewhat better than last year. The quality and yield of the wool in some zones will be superior to that of last year because of abundant rains and adequate feed supplies. In other areas, excessive rains and snowfalls will probably reduce yields from last year's levels.

Uruguay. Wool production has been estimated at 189.6 million pounds, which is approximately 9 million pounds over the August estimate. This represents a 2.4 percent increase over a year ago. An increase in sheep numbers, combined with better climatic conditions on the ranges, have contributed to the increased production of wool.

South Africa. Wool production prospects for the 1966-67 season have been revised downward another 3 million pounds below the August forecast of 345 million pounds. This is a decrease of about 20 million pounds from the record clip of last season. This grim picture is the result of the cumulative effects of the prolonged drought that adversely affected both the weight and quality of the South African wool clip.

United States. Wool production is continuing to decline. The 1966 clip is estimated to be 250 million pounds, 19 percent below the 1956-60 average and 1 percent below last year's clip. This is due primarily to the continuing decline of sheep numbers on farms and ranches in the United States.

1965 World Trade in Wool

Raw Wool Exports Up 8 Percent In 1965. World exports of raw wool in 1965 totaled approximately 3,200 million pounds, up 8 percent from the previous year. Approximately 85 percent of the wool entering world trade originated in the 5 major producing countries (Australia, New Zealand, Argentina, Uruguay, and South Africa) in the Southern Hemisphere. The major portion of this wool was exported to countries in the Northern Hemisphere including the United States, United Kingdom, the EEC countries, and Japan.

In total the 5 producing countries in the Southern Hemisphere shipped nearly 10 percent more wool in 1965 than they did in 1964. Countries with significant increases over 1964 were Uruguay, Argentina, and the Republic of South Africa. Of particular importance was the increase in Uruguayan exports that took place due to the release of wool stocks.

World wool consumption in 1965 was estimated at 3,246 million pounds, about 2 percent above 1964. However, total usage of other natural fibers was down 4 percent. Man-made fibers continued to take a larger share of the textile market. As a result, both virgin wool and man-made fibers have gained in importance. Man-made fibers accounted for 21 percent of all materials consumed in 1965. This compares to 20 percent in 1964 and 16 percent in 1963.

Imports of wool in all consuming countries of the world increased 5 percent over last year. The United States showed the major increase, 30 percent over 1964. The rise was primarily in the imports of duty-free wool of the carpet type. Of the other major consuming countries, France and Japan showed minor increases while Belgium and Italy showed declines with West Germany remaining constant over last year.

Wool (actual weight): International trade, average 1956-60, annual 1963-65

Country	Average 1956-60		1963		1964		1965 1/	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
North America:								
Canada	3,548	19,261	3,675	16,557	2,417	19,762	2,924	19,791
United States	2/ 1,655	316,262	2/ 175	368,523	2/ 116	283,122	2/ 617	369,162
Mexico	0	13,325	0	17,645	0	25,094	0	31,143
Total North America	5,203	348,848	3,850	402,725	2,533	327,978	3,541	420,096
South America:								
Argentina	255,804	0	289,347	0	203,485	0	269,561	0
Brazil	7,582	764	6,357	7,047	36,988	35	28,036	62
Chile	16,541	579	17,374	2,109	12,177	1,323	12,500	916
Colombia	0	1,728	0	13,496	0	13,198	0	14,000
Falkland Islands	4,540	0	5,061	0	4,841	0	5,019	0
Peru	4,958	37	9,198	20	8,241	2	2,831	15
Uruguay	98,381	0	101,074	0	48,718	0	125,155	0
Total South America	387,806	3,108	428,411	22,672	314,450	14,558	443,102	14,993
Europe:								
EEC:								
Belgium and Luxembourg	35,744	185,197	49,934	207,709	36,433	232,785	43,510	223,837
France	69,033	388,016	86,528	361,157	69,937	304,228	72,282	328,823
Germany, West	10,894	225,785	11,540	234,630	9,390	226,080	9,460	222,750
Italy	3,442	230,513	8,910	303,814	7,934	275,708	7,059	263,745
Netherlands	8,662	31,858	12,405	33,025	9,713	32,202	11,784	32,729
Total EEC	127,775	1,061,369	169,317	1,140,335	133,407	1,071,003	144,095	1,071,884
Western:								
Austria	89	14,549	470	16,442	392	14,230	540	13,748
Denmark	1,091	5,054	1,729	6,430	1,620	6,408	1,700	6,300
Finland	90	11,177	10	8,770	10	8,388	10	6,975
Greece	437	4,175	101	4,674	174	3,203	122	5,972
Iceland	1,197	160	800	200	600	200	600	200
Ireland	18,861	12,063	24,055	13,358	16,222	12,593	27,531	11,105
Norway	1,932	1,873	2,648	3,999	2,235	3,911	2,200	2,862
Portugal	619	10,416	2,423	10,672	732	14,526	254	14,178
Spain	1,259	6,785	6,064	19,920	5,695	21,927	5,622	19,922
Sweden	1,417	10,953	3,239	10,569	1,177	10,740	866	12,163
Switzerland	188	14,628	1,187	15,894	873	13,063	891	15,199
United Kingdom	34,527	686,128	70,527	629,876	57,018	570,770	61,376	558,527
Total Western Europe	189,482	1,839,330	282,570	1,881,139	220,155	1,750,962	245,807	1,739,035
Eastern:								
Bulgaria	0	4,468	0	3,691	0	4,758	0	---
Czechoslovakia	0	46,200	0	44,000	0	46,300	0	---
Germany, East	0	29,908	0	51,390	0	49,190	0	54,450
Hungary	660	6,768	1,800	9,315	4,500	10,099	---	---
Poland	0	42,137	0	32,795	0	34,618	0	38,230
Romania	1,400	1,090	2,200	700	1,900	1,800	2,600	3,100
Yugoslavia	1,629	13,486	946	25,266	505	33,279	398	35,550
Total Eastern Europe 3/	3,689	144,057	4,946	167,157	6,905	180,044	7,498	194,130
Total Europe 3/	193,171	1,983,387	287,516	2,048,296	227,060	1,931,006	253,305	1,933,165
U.S.S.R. (Europe and Asia)	28,967	123,588	59,500	92,600	53,100	100,800	56,900	115,100

(Continued)

Wool (actual weight): International trade, average 1956-60, annual 1963-65

(Continued)

Country	Average 1956-60		1963		1964		1965 1/	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Africa:								
Algeria	1,251	757	800	200	---	---	---	---
Libya	1,530	0	1,398	0	2,581	0	2,600	0
Morocco	6,778	416	3,780	541	4,333	345	1,967	606
Tunisia	1,420	140	---	---	690	364	---	---
United Arab Republic	168	1,790	10	2,093	0	2,902	32	5,782
Kenya	1,864	28	3,367	0	2,875	106	3,019	100
So. Africa, Rep. of 4/	240,497	4,940	248,640	9,974	233,467	7,171	269,550	7,000
Total Africa 3/	253,508	8,071	258,295	13,008	244,746	11,088	278,668	14,088
Asia:								
Cyprus	858	0	999	0	1,202	0	1,045	0
Iran	18,886	672	8,841	3,110	7,432	3,527	1,841	8,088
Iraq	13,905	212	12,747	181	10,121	452	---	---
Israel	103	1,580	222	1,259	43	2,983	66	4,075
Jordan	568	0	179	88	765	35	2,019	160
Lebanon	5,986	4,836	6,504	4,944	11,160	8,468	---	---
Turkey (Europe and Asia)	9,123	9,154	9,264	25,564	10,557	17,322	8,107	19,554
Syria	15,062	1,323	12,018	190	17,608	245	16,607	432
China:								
Mainland	36,507	18,846	37,601	36,052	48,940	42,152	45,825	25,839
Taiwan	0	360	0	2,187	0	3,200	---	---
Afghanistan	14,341	0	12,610	0	10,083	0	---	---
India	35,889	3,263	16,715	14,522	28,317	16,263	22,586	17,926
Japan	2,656	323,535	300	526,324	2,100	497,547	---	546,699
Korea, Rep. of	0	1,414	0	5,950	0	2,380	0	2,700
Pakistan	29,027	1,210	30,807	600	21,585	3,000	23,725	---
Total Asia 3/	182,911	366,405	148,807	620,971	169,913	597,574	154,821	639,923
Oceania:								
Australia	1,272,356	6,840	1,432,196	---	1,400,657	---	1,461,842	---
New Zealand	471,614	280	566,100	2,500	552,600	3,700	548,900	---
Total Oceania 3/	1,743,970	7,120	1,998,296	9,500	1,953,257	10,700	2,010,742	10,700
Total 3/ 5/	2,795,536	2,840,527	3,184,675	3,209,772	2,965,059	2,993,704	3,201,079	3,148,065

1/ Preliminary. 2/ Washed, scoured or clean basis. 3/ Includes allowances for missing data for countries shown. 4/ Includes exports from South West Africa and Botswana. 5/ Excludes wool on the skins, re-exports where possible; imports in most cases refer to gross imports.

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FW-2
September 1967

WORLD WOOL PRODUCTION UP IN 1967

World wool production in 1967 (including the 1967-68 season in the Southern Hemisphere) has been estimated at slightly more than 6.0 billion pounds, greasy basis. This is approximately 2 percent above the revised figure of 5.9 billion pounds in 1966.

In the five major-producing countries of the Southern Hemisphere (Australia, New Zealand, Argentina, Uruguay, and South America) production was estimated to exceed last year's output by 69 million pounds. Nearly 60 percent of the world's wool supply is produced in these 5 countries. Higher production in Australia, New Zealand, and South Africa is expected to more than offset a decline in Argentina; Uruguayan production was estimated to be about equal with production in 1966.

U.S.S.R. production has been estimated to reach 850 million pounds, up nearly 4 percent from 1966. This was due to continued recovery in sheep numbers, which commenced in 1965 and continued through 1966. Numbers at the beginning of 1967 were up 4 percent from the previous year. Production in the United Kingdom was estimated to be down nearly 4 percent, due to reduced sheep numbers resulting largely from increased slaughter and the cool, wet spring in 1966 which had an adverse effect on lambing.

This Circular contains more detailed information than the summary of similar title, published in World Agricultural Production and Trade, August, 1967.

Wool: Production in specified countries, average 1956-60
annual 1965-67 1/

Continent and country	Average 1956-60	1965	1966	1967 2/	Percent change	
					1967 / 1956-60	1967 / 1966
	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent
North America:						
Canada	7.7	5.8	5.0	4.9	-36	- 2
United States 3/	308.8	241.1	235.1	228.1	-26	- 3
Mexico	9.6	12.9	13.4	13.5	+41	+ 1
Other countries	1.0	1.0	1.0	1.0	0	0
Total North America	327.1	260.8	254.5	247.5	-24	- 3
South America:						
Argentina	448.1	429.9	440.9	435.0	- 3	- 1
Brazil	60.4	77.9	68.1	70.0	+16	+ 3
Chile	48.7	56.2	56.2	57.0	+17	+ 1
Falkland Islands	4.5	4.5	4.5	4.5	0	0
Peru	20.9	23.1	22.0	21.6	+ 3	- 2
Uruguay	180.2	185.2	189.6	190.0	+ 5	4/
Other countries	15.4	16.7	16.7	16.7	+ 8	0
Total South America	778.2	793.5	798.0	794.8	+ 2	4/
Europe:						
Western:						
EEC:						
France	62.9	61.0	61.4	61.4	- 2	0
Italy	30.4	34.2	32.7	34.5	+13	+ 6
Germany, West	11.5	6.8	6.4	6.5	-43	+ 2
Other EEC	3.6	2.9	3.2	3.2	-11	0
Total EEC	108.4	104.9	103.7	105.6	- 3	+ 2
Greece	25.1	26.0	19.7	19.4	-23	- 2
Ireland	21.2	26.2	25.6	23.5	+11	- 8
Norway	8.0	8.0	8.0	8.0	0	0
Portugal	23.8	26.0	26.2	26.5	+11	+ 1
Spain	72.6	79.8	79.4	80.0	+10	+ 1
United Kingdom	116.3	127.3	129.0	124.0	+ 7	- 4
Other countries	9.4	10.5	10.5	10.5	+12	0
Total Western Europe	384.8	408.7	402.1	397.5	+ 3	- 1
Eastern:						
Bulgaria	38.6	56.9	57.3	57.8	+50	+ 1
Hungary	15.7	22.4	22.8	23.4	+49	+ 3
Poland	20.5	16.5	17.6	17.8	-13	+ 1
Romania	44.5	56.0	57.5	60.6	+36	+ 5
Yugoslavia	31.3	27.8	29.7	30.9	- 1	+ 4
Other countries	25.0	27.0	27.1	27.3	+ 9	+ 1
Total Eastern Europe	175.6	206.6	212.0	217.8	+24	+ 3
Total Europe	560.4	615.3	614.1	615.3	+10	4/
U.S.S.R.	698.8	787.0	820.0	850.0	+22	+ 4

(Continued)

Wool: Production in specified countries, average 1956-60 annual 1965-67 1/

(Continued)

Continent and country	Average 1956-60	1965	1966	1967 2/	Percent change 1967/1956-60	Percent change 1967/1966
	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent
Africa:						
Algeria	19.0	19.0	19.0	19.0	0	0
Morocco	34.9	30.9	35.3	35.0	4/	- 1
Tunisia	7.8	9.0	9.0	9.0	+15	0
United Arab Republic	5.2	5.5	5.5	5.5	+ 6	0
South Africa 5/	313.9	362.5	320.0	335.0	+ 7	+ 5
Other countries	14.2	15.1	15.1	15.1	+ 6	0
Total Africa	395.0	442.0	403.9	418.6	+ 6	+ 4
Asia:						
Iran	41.9	40.8	41.9	42.3	+ 1	+ 1
Iraq	24.7	28.0	28.0	28.0	+13	0
Turkey	91.2	94.8	97.0	99.2	+ 9	+ 2
Syria	18.2	29.1	33.1	30.0	+65	- 9
India	73.8	77.2	78.3	81.6	+11	+ 4
Japan	7.5	1.7	1.2	0.8	-89	-33
Pakistan	32.5	37.5	40.0	41.0	+26	+ 3
Other countries	218.6	234.8	235.5	237.5	+ 9	+ 1
Total Asia	508.4	543.9	555.0	560.4	+10	+ 1
Oceania:						
Australia	1,578.8	1,662.8	1,758.9	1,816.6	+15	+ 3
New Zealand	538.3	694.8	723.0	725.0	+35	4/
Total Oceania	2,117.1	2,357.6	2,481.9	2,541.6	+20	+ 2
Total World	5,385.0	5,800.1	5,927.4	6,028.2	+12	+ 2

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes pulled wool converted to greasy basis using 1.7 conversion factor. 4/ Less than 0.5 percent change. 5/ Includes Republic of South Africa, Lesotho, and South West Africa.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research and related information.

U.S. wool production in 1967 was estimated at 228 million pounds (including pulled wool, greasy basis), 3 percent below the 1966 level. This is the seventh consecutive year of declining wool production in the United States. Sheep numbers as of January 1, 1967 continued their downward trend and were 4 percent below a year earlier.

Australia. The first forecast of wool production for the 1967-68 year has been estimated at 1,816.6 million pounds, 3.3 percent above the 1966-67 clip. The increase over last year's production is based on a probable 9 million more sheep to be shorn, although the average clip per head is expected to be down from 9.11 pounds to 9.00 pounds. The lower average clip per head is anticipated as a result of dry conditions in Victoria and New South Wales.

New Zealand. Wool production in 1967-68 was expected to reach 725 million pounds due to favorable climate conditions and larger sheep numbers. For the first time in history, New Zealand sheep numbers exceeded 60 million head as of the first of the year. However, fewer sheep may be shorn due to excessively large stocks held by the New Zealand Wool Commission and lower prices.

Argentina. The 1967-68 wool clip is expected to decline moderately from the 1966-67 level of 441 million pounds. The smaller clip is due to larger sheep slaughter which began during the latter part of 1966. Current information indicates that slaughter is still continuing upward.

Uruguay. Wool production during 1967-68 may equal or be slightly below the 190 million pound clip of the previous year. Early analysis indicated that severe drought conditions in many areas during the early part of 1967 did not adversely affect sheep flocks and numbers were estimated to be slightly larger than last year. However, recent reports indicate that prolonged droughts, unprecedented frosts, and widespread floods which occurred throughout the year may have an adverse effect on the new wool clip.

South Africa. Wool production in 1967-68 was estimated at 335 million pounds, nearly a 5 percent increase over the previous year. The drought that reduced wool production in 1966-67 was not as serious as originally estimated. This may reflect improved management practices on African sheep farms, particularly in grazing and breeding practices.

Wool Stocks and Prices

Carryover stocks of raw wool at the beginning of the 1966-67 season in exporting countries and those held by Wool Commission and other official bodies were estimated to have amounted to some 110 million pounds, clean basis, or about 30 percent less than a year earlier. Stocks in each of the five major-producing countries showed reductions. The sharpest drop was in South America where the greater part of the previous season's clip had been disposed of before the opening of the new selling season.

With the opening of the new marketing season, neither New Zealand nor the South African Wool Commission had stocks of any size on hand. However, as the season progressed and world wool prices fell, the volume of their purchases rose substantially. The subsequent fall in wool consumption has also led to substantial build-ups of stocks in certain countries, again particularly in New Zealand. The New Zealand Wool Commission purchased substantial quantities of raw wool in order to maintain their predetermined floor prices.

Probably the chief reason for the fall in raw wool consumption and resulting lower world wool prices was the intensification of competition from man-made synthetic fibers, which for the first time were in general over-supply.

World wool prices declined appreciably during the last three months of 1966. However, since January 1967, there has been little significant movement in either direction.

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WORLD MOHAIR PRODUCTION AND TRADE

Summary

World mohair[1] production declined for the second consecutive year from the 1965 high of 66.4 million pounds. Production for 1967 was estimated at 62.8 million pounds, the fifth largest clip on record. The downward trend in production is attributed to declining goat numbers on farms in both the United States and South Africa.

World exports of mohair through 1966 continued to rise from the abnormal low in 1964 of 20.6 million pounds. Exports in 1966 totaled 33.1 million pounds, an increase of 1.2 percent over a year earlier. The increase was mainly due to larger exports from South Africa and the United States.

Table 1.--Mohair: Production in specified countries, greasy basis, 1956-60 average, annual 1961-67

Year 1/	United States	Turkey	Rep. of So. Africa	Lesotho 2/	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1956-60 Av.	21.2	18.5	6.5	1.3	47.5
1961	26.4	20.7	9.5	1.7	58.3
1962	27.2	19.5	10.9	1.9	59.5
1963	29.0	19.7	12.1	2.2	63.0
1964	29.8	18.7	12.5	2.1	63.1
1965	32.5	18.3	13.4	2.2	66.4
1966	29.6	19.4	14.0	2.2	65.2
1967 3/	28.0	19.8	13.0	2.0	62.8

1/ In the United States, year beginning April 1; Republic of South Africa, year beginning July 1. 2/ Formally Basutoland. 3/ Estimated.

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[1] Mohair is the fleece of the Angora goat of the Turkish plateau, South Africa Cape, and southwestern United States. Production in other areas of the world is insignificant and is not included in the estimate of world production.

Production

World mohair production in 1967 in the three major producing areas--which account for nearly all of the world's mohair output--was estimated at 62.8 million pounds, compared with 65.2 million in 1965 and the 1964 high of 66.4 million.

Production in both the United States and South Africa was down while production in Turkey was up slightly from 1966. The smaller clip this year was attributed to declining goat numbers on farms and ranches in both the United States and South Africa.

United States. The 1967 clip was placed at 28.0 million pounds, down 5 percent from last year. This decline was caused mainly by a 4 percent reduction in the number of goats and kids on Texas farms and ranches. About 97 percent of all the goats in the United States clipped for mohair are in this state. The remaining clip is produced in Arizona, New Mexico, California, Oregon, Utah, and Missouri.

The United States continues to be the world's largest producer of mohair since 1957. Before that date, Turkey was the largest. Production in the United States showed a steady upward trend through 1966, but turned downward slightly in 1967.

Turkey. The 1967 clip was estimated at 19.8 million pounds, slightly above the 19.4 million for 1966. Goat numbers on farms, at 5.6 million head, were almost equal to those of the previous year. Average mohair yield per goat in Turkey continues to remain about one half of the U.S. average, due largely to adverse climatic conditions and frequent feed shortages. The average yield for 1967 is estimated at 3.7 pounds, compared with 6.8 pounds in the United States.

South Africa. Production turned downward in 1967 after showing a steady upward trend for many years. This season's clip was placed at 13 million pounds, down slightly from the 14 million for 1966. The severe drought caused larger numbers to be slaughtered and above normal death losses in the major producing areas which reduced the number of animals clipped. However, the quality of the clip is reported to be shorter and finer which should be high-yielding because it contains less grease that does not hold the dust and sand as opposed to the open wasty fleeces.

South Africa has achieved the highest mohair yields per animal in the world due to advanced methods of breeding and management. Average yield per animal from the 1955 through the 1963 clip averaged 7.6 pounds. This compares with slightly over 6 pounds in the United States.

Production in Lesotho (Basutoland) continued upward through 1966 but dropped slightly in 1967. This season's clip is estimated at 2.0 million pounds, compared with 2.2 million for 1966.

Trade

World mohair exports continued to rise through 1966 from the abnormal low in 1964. Shipments in 1966 totaled 33.1 million pounds, compared with 32.7 million for 1965 and the 1964 low of 20.6 million. Larger shipments from both the United States and the Republic of South Africa accounted for the gain and more than offset the smaller exports from Turkey. Japan and the United Kingdom stepped up their takings in 1966 while Belgium-Luxembourg and West Germany reduced their purchases.

Because mohair represents such a relatively small fraction of total textile fibers entering world trade, most importing countries do not maintain separate statistics. Thus the most complete data on trade are provided by the producing and exporting countries. In most countries, mohair is imported by the normal wool trade in various forms, such as raw, scoured, tops, and yarn. The trade in mohair tops and yarn are exports of semimanufacturers of the major importing countries. The United Kingdom is the principal exporter of these products.

Table 2.--Mohair: Exports from specified countries, actual weight, 1956-60 average, annual 1961-66

Year	United States 1/	Turkey	Rep. of So. Africa 2/	Total
	Million pounds	Million pounds	Million pounds	Million pounds
1956-60 Av. ..	14.9	10.4	7.5	32.8
1961.........	13.5	13.1	10.1	36.7
1962.........	12.5	9.5	11.8	33.8
1963.........	14.2	15.9	13.8	43.9
1964.........	2.7	6.6	11.3	20.6
1965.........	8.5	9.9	14.3	32.7
1966.........	10.7	7.0	15.4	33.1

1/ Clean content calculated as 4/5 greasy weight. 2/ Includes Lesotho.

United States. Exports of mohair, including other wool-like specialty hair, rose to 10.7 million pounds from the abnormally low figure of 2.7 million in 1964. However, this recovery in export shipments is still considerably below the 1956-60 annual average of 14.9 million.

Table 3.--Mohair 1/: U.S. exports by country of destination, clean basis, 1961-66

Country of destination	1961	1962	1963	1964	1965	1966
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United Kingdom	7,246	6,463	6,666	778	4,169	6,829
Japan	2,087	969	2,537	447	771	1,190
Belgium-Luxembourg	1,167	1,418	1,403	430	1,452	661
Netherlands	1,765	1,889	1,498	250	366	440
Mexico	70	80	198	336	404	384
Italy	38	1,003	1,278	30	167	282
Spain	4	10	9	12	188	212
Canada	323	79	99	135	144	203
West Germany	138	151	63	9	574	198
Switzerland	209	409	364	147	185	133
Other	476	69	85	83	88	135
Total	13,523	12,540	14,200	2,657	8,508	10,667
Percent of production	64	58	56	11	33	45

1/ Including other wool-like specialty hair.

The major export market for U.S. mohair is the United Kingdom. Shipments to this country during 1966 represented 64 percent of the total followed by Japan with 11 percent. Other markets include Belgium, the Netherlands and Mexico with the latter country stepping up its purchases significantly.

Turkey. Exports dropped to 7.1 million pounds from 9.9 million for 1965. Reduced exports to the United Kingdom, France, and Spain more than offset larger shipments to Czechoslovakia, Poland, Hungary, Yugoslavia, U.S.S.R. and East Germany.

According to a report prepared by the Export Promotion Center (IGEME) in Turkey, exports from Turkey during the last few years have been decreasing because of fashion changes which have decreased mohair consumption in many major importing countries.

Table 4.--Turkey: Exports of mohair by country of destination, actual weight, 1962-66

Country of destination	1961	1962	1963	1964	[2] 1965	1966
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United Kingdom........	8,395	5,838	8,631	2,956		1,764
France................	1,391	724	991	1,271		882
Czechoslovakia........	661	570	683	28		441
Spain.................	648	484	972	518		[1]
Israel................	441	0	661	[1]		[1]
Poland................	326	216	827	110		220
Italy.................	256	19	580	207		
Hungary...............	234	628	999	377		882
Germany, West.........	126	11	104	0		[1]
Yugoslavia............	79	0	293	337		661
U.S.S.R.	[1]	[1]	[1]	[1]		882
Germany, East.........	[1]	[1]	[1]	[1]		661
Other.................	556	1,002	1,177	788		661
Total...............	13,113	9,492	15,918	6,592	9,892	7,054

[1] If any, included with others. [2] Not available by country detail.

South Africa. The demand for mohair in South Africa is small. Practically all of each season's clip is sold at auction for export, purchased principally by buyers from the United Kingdom. Exports in 1966 totaled 15.4 million pounds, up 8 percent from 14.3 million in 1965. Exports to the United Kingdom during 1966 represented 42 percent of total followed by Japan with 31 percent. Other export markets included Italy, France, and Spain.

Table 5.--Republic of South Africa [1]: Exports of mohair, by country of destination, actual weight, 1962-66

Country of destination	1961	1962	1963	1964	1965	1966
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United Kingdom........	4,802	5,796	7,476	5,958	8,557	6,520
Japan.................	1,785	1,995	2,613	1,111	1,823	4,773
Italy.................	1,268	1,881	1,992	1,295	1,156	2,211
France................	816	431	573	789	551	485
Netherlands...........	369	402	123	534	311	361
Germany, West.........	260	257	237	172	50	---
Belgium...............	290	350	171	718	816	226
Spain.................	---	---	---	---	767	405
Other.................	490	716	580	761	255	440
Total...............	10,080	11,828	13,765	11,338	14,286	15,421

[1] Includes Lesotho.

Most of the mohair consumption in the world is concentrated in the high-income countries of Western Europe, the United States, and Canada. Because the demand for mohair will continue to be limited to countries with high average per capita incomes, it is reasonable to assume that South Africa will continue to export virtually all her mohair. However, the recent establishment of mohair processing facilities will allow South Africa to export a partially processed product (tops and yarn) and thus a more valuable product in the future.

United Kingdom. The United Kingdom is the world's largest importer and consumer of mohair. Imports in 1966 totaled 19.3 million pounds, compared with 21.2 million in 1965 and 1960-64 annual average of 32.1 million. About one-half of these imports are consumed within the United Kingdom while the remaining portion is used in the production of tops and spun into woolen and worsted yarn for export.

Table 6.--United Kingdom: Total imports of mohair, actual weight, 1962-66

Country	1961	1962	1963	1964	1965	1966
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United Kingdom.........	25,941	20,508	28,578	14,052	21,206	19,306

Japan. Japanese imports of mohair totaled 3.4 million pounds in 1966, up 23 percent from 1965. However, imports have fluctuated widely since 1960. Annual imports have ranged from a low of 2.4 million pounds for 1964 to a high of 6.8 million in 1961. South Africa is Japan's principal source of supply followed by the United States.

Table 7.--Japan: Imports of mohair by country of origin, 1962-66

Country of origin	1961	1962	1963	1964	1965	1966
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United States..........:	2,760	952	2,976	833	794	1,102
Rep. of South Africa...:	1,947	1,686	2,502	1,537	1,936	2,298
United Kingdom.........:	1,188	628	342	42	51	28
Belgium................:	95	42	77	2	---	1
Netherlands............:	282	187	160	22	1	0
West Germany...........:	4	33	39	0	0	0
Others.................:	512	10	103	0	7	5
Total................:	6,788	3,538	6,199	2,436	2,789	3,434

Outlook

Future demand for mohair will depend largely upon foreign economic prosperity and fashion trends. Price is also an important factor as man-made and other fibers can be substituted readily in apparel fabrics to achieve similar results. Mohair is a specialty fiber and the demand for it is influenced by fashion changes. It is generally more expensive than wool and is in greater demand during periods of prosperity. However, with its limited alternative uses, market promotion efforts are now directed toward developing uses for mohair that are less affected by changing fashions.

During recent years, mohair has been used largely as an apparel fiber along with some slow recovery in manufacture of automobile upholstery. With a resumption of both domestic and export demand and continued prosperity, the long-term outlook for U.S. mohair producers seems fairly encouraging. The extreme fluctuations in demand and prices of the past will probably continue to be a characteristic of the industry in the future.

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